

PDP 2024/2025

Economy Officers Training

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Suvi Valasmo / Project Controller

Johanna Salmela / Controller



Aalto University
School of Engineering

PdP Economy Officers´ guideline

- Your team has a budget – Aalto University money – keep track of it
- Know the rules of spending: project related, trackable, transparent, according to Aalto financial guidelines
 - Buy the necessary thing → Prove the purchase, take receipt → Get paid
- You are representing Aalto University Foundation
 - Foundation bookkeeping is public and possible to audit at any point → Transparency in purchases; Aalto finance rules
- Business and pleasure apart → Separate receipts if you purchase personal stuff
- VAT → ALWAYS have a receipt showing the VAT (Value-added tax)

Team budget and funding

- **Budget / team: Max. 10 000€**
 - To be spent on the project relevant matters (sponsor visits, prototype materials)
 - **Generally frowned upon at Aalto:** entertainment, buying food / refreshments unless for University's guests or for an event
 - 1-2 team building events (total, whole course time) are allowed from the teams' own budget (cost around 15e / person)
- **As a reference, think as prototyping 50% / travel 50% (PdP Gala).** This may vary according to situation / your specific team requirements
- **Where does the money come from?**
 - Aalto University Foundation → School of Engineering → Department of Mechanical Engineering → Product Development [Cost Unit] T21208 → PdP [project] 400625

Your COST UNIT: T21208

PROJECT: 400625 (Product Development Project)

Ways to buy for project #1 Ask seller to invoice Aalto

- **Invoicing address:**

Business ID (VAT): FI22283574 (Aalto-korkeakoulusäätiö)

EDI code (e-invoicing address): 003722283574

Online invoicing operator: OpusCapita Solutions Oy

Operator EDI code: E204503

- **Aalto accepts ONLY e-invoices from domestic suppliers**

- Foreign suppliers may send invoice in pdf format in this case, forward invoice to Project Controller suvi.valasmo@aalto.fi

- Delivery address **MUST** include the name of Aalto University (with correct delivery address e.g. Aalto University, Puumiehenkuja 5A, 02150 Espoo, Finland)

- **Invoices need to include the reference:** cost center – project – contact person

- In PdP **T21208 – 400625 - Team name/Economy officer**



Ways to buy for project: #2 Aalto credit card - Let the PdP Staff help

- Aaro / Joonas have an Aalto credit card
- If you need to buy something with credit card (bigger purchases etc.) ask Aaro / Joonas for help
- If you need to buy something from Amazon, ask Aaro/Joonas for help since Aaro, Joonas and Sara have an Aalto Amazon Business IDs (Also George & Shreyasi at DF)
- If you need to order something from Verkkokauppa, ask George (has a customer ID there – invoicing)

Ways to buy for project #3 Purchase yourself → Claim in NEO

- Always save the receipt! Just PDP project cost, no personal buyings
- Claim cost against the receipt in NEO, Aalto travel and expense management system
- All Aalto students can create an account in NEO → **The one who does the purchase needs to do the claim (cannot be done for someone in NEO)**

The general VAT rate used
for most goods and services
is 25,5%



Receipts, proofs, lists

- **Transparency:** Each claim must be verified with a seller's receipt
- **Info required:**
 - The Whole Actual Receipt as a pdf copy (preferably)
 - What bought? When bought? From where? (Delivered to where?) What did it cost? Applied VAT?
- **List of participants needs to be provided as an attachment when**
 - it is an event
 - bought refreshments / food is served
 - travel
- **Domestic purchase**
 - VAT is deducted/compensated. A proper receipt needs to be included
- **Purchase for the project from abroad**
 - By providing Aalto Business ID → 0% VAT invoice → **LESS COST FOR THE PROJECT**



Only the 0% price eats up your budget:

Price: 21,55€ (incl. VAT)
With a receipt proof
Cost to project 17,39€

Travel

- **From PdP Teaching Team's point of view:**

- Plan your travel well ahead and discuss it with the teaching team either face to face or via email. They would like to know the purpose of travel, how does it contribute to your project, where, when, and participants
- Keep the travel expenses as budget friendly as possible!
- Remember the rule of thumb: max 5000 Eur for all the travel expenses throughout the project

- **From AALTOs' point of view:**

- The Finnish tax authorities have clarified the guidelines for reimbursement of study-related travel expenses
- Reimbursement of study-related travel expenses is treated as taxable income (tax authorities) UNLESS these are covered with a **travel grant**

→ **Plan ahead!** Prepare to apply for a travel grant if traveling!

- **Apply for the grant at least four weeks before your planned trip.** If you travel with a group of more than 10 people, submit your application at least six weeks before the trip
- More of the Travel Grant for the students



Types of travel and how to act

- **Domestic long distance travel (local ADF Team):**
 - You visit the sponsor facilities further ahead; stay overnight or longer → Plan ahead! **You must apply for a travel grant.** Eetu / Tua approves the application
- **Long distance travel abroad (local ADF Team) :**
 - You travel abroad for project reasons (e.g. visit sponsor / meet the global team) → Plan ahead! **You must apply for a travel grant.** Eetu / Tua approves the application
- **Long distance travel (GlobalTeam) to Finland**
 - Global Team arrives to PdP Gala → Plan ahead! **Travelers must apply for a travel grant.** Eetu / Tua approves the application. You may fill the application on behalf of the global team participants.

Types of travel and how to act

- **Domestic short distance travel (local ADF Team), EXCEPTION TO THE TRAVEL GRANT RULE:**
 - You all get in a one car and drive to visit the sponsor nearby
 - You take a public transport to have a meeting with the sponsor
 - You take a car / bus to pick up an urgently needed prototype part from supplier
 - You need to transport the prototype for testing / for sponsor to see etc.
- Regarded as representing Aalto University while completing the project. This means the costs can be paid tax-free from the project **without a previously applied travel grant**

Travel Grant How to apply

- The student applies for the travel grant personally, for each travel separately and before the travel takes place
 - Apply for the grant at least four weeks before your planned trip. If you travel with a group of more than 10 people, submit your application at least six weeks before the trip
 - Estimate the cost of the trip. Travel is by public transport, economy/basic class or student fare considering overall economy and safety. You can search for flight and hotel prices in Aalto's Neo travel and expense management system. Accommodation prices (such as Airbnb) can also be searched outside Neo
 - Fill in the application form carefully. If any details are missing, the form will be sent back to the student for updating
 - Seek approval for the trip and the travel grant from the head of the department. The application can be signed in writing, electronically, or it can be approved by email
 - Submit the form after it's been signed or approved by the head of the department. Send it to travelgrants@aalto.fi and cc: suvi.valasmo@aalto.fi. You will receive the grant decision within two weeks of submitting the application



Visitor form

- In the case you are arranging flights for your global team members (non-Aalto students - for the final Gala for example), additional document “**Aalto personal data / Visitor**”
 - available in Mycourses
 - the info that is usually needed for flight booking
- Send the personal data forms and travel details to PdP office: they will be forwarded **to Aalto travel services, to buy travel insurances and flights for all passengers**



Personal data (Please use block letters)

Last name	First names	
Preferred name if different than above (aalto.fi address is generated based on the preferred name.)		
Last name	First name	
Finnish national ID (Please provide Date of Birth (DD.MM.YYYY) if you do not have Finnish national ID)		
Home address in a country of permanent residence		
Postal code and city	Country	
Street address in Finland during the visit (if permanently residing outside Finland)		
Postal code and city		
Home telephone number in international format (e.g. +358...) (Please prefer mobile phone.)		
E-mail address (different than aalto.fi)		
Gender		
<input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Other	
Home country	Nationality	Dual citizenship

Please fill out if you are currently a student at Aalto University

Student number

The personal data I provide will be registered in the HR information system of Aalto University. The data may be transferred to other Aalto University information systems (e.g. relating to user account administration, building access control or for academic visitors, the ACRIS research information system). The contact information I provide may be used by the IT account administrators in order to contact me.

NEO Aalto Travel & Expense management system

Create account:

- Open the guidance for profile creation via [this link](#) (you need your Aalto ID and password) and follow the instruction:
- Fill the requested information. All details are mandatory due to Finnish taxation and bookkeeping rules
- It takes an hour for the system to create a NEO profile for you

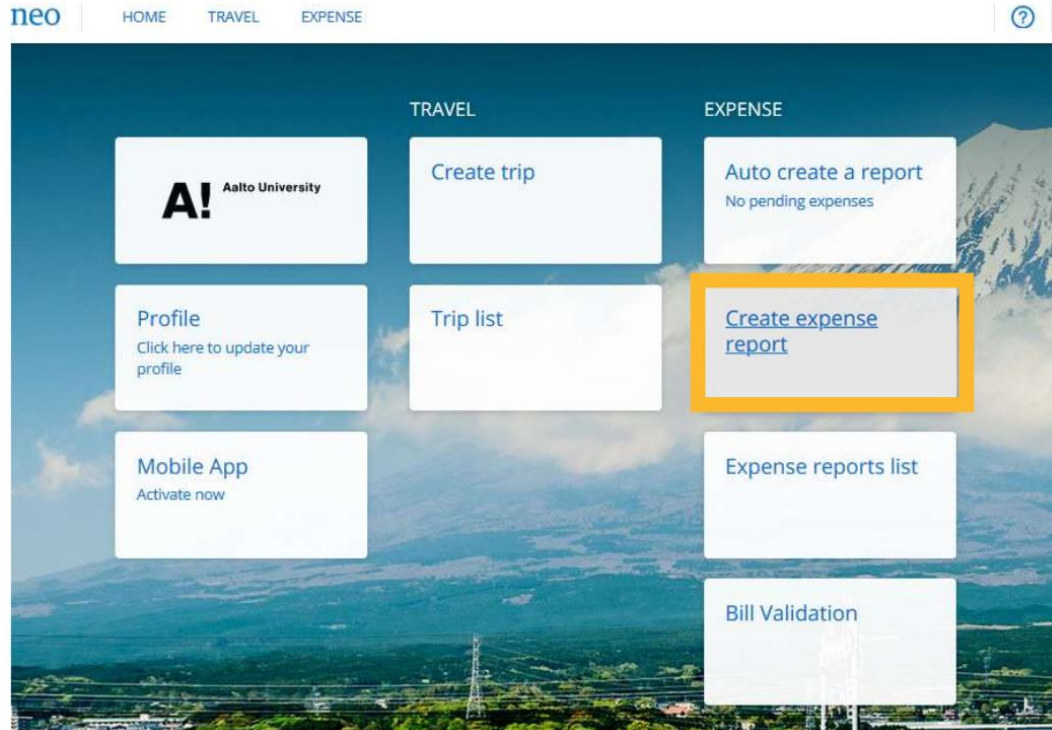
Create the expense report:

- Log in to NEO from the aalto.fi pages Tools or by typing neo.aalto.fi in your browser
- Please note that you can access Neo from anywhere but if you are not in Aalto network (Aalto workstations, VPN or VDI) multifactor authentication (MFA) is used
- Instructions on how to use VDI: <https://www.aalto.fi/en/services/vdiaaltofi-how-to-use-aalto-virtual-desktop-infrastructure>
- Instructions on how to setup VPN connection to Aalto: <https://www.aalto.fi/en/services/remote-connection-to-aaltos-network-vpn>

NEO Aalto Travel & Expense management system

- **Before you start making your expense report in NEO, make sure you have the following at hand:**
 - Project number and cost center
 - Receipts from your purchases
- **Please note the following when making your expense report:**
 - Only report those expenses you have paid and that your teacher/course responsible person has approved
 - Attachments have to be in PDF or picture format (.jpg, .png, ..).
 - The maximum size of an attachment is 3MB
 - Do not attach documents with sensitive information to your expense claim (e.g. bank account details)
 - The processing of the expense report takes approximately 2-3 weeks
 - If some information is missing, the claim will be returned to you and the payment will be delayed

Step 1 Select “Create expense report”



Step 2 Fill in the expense report base

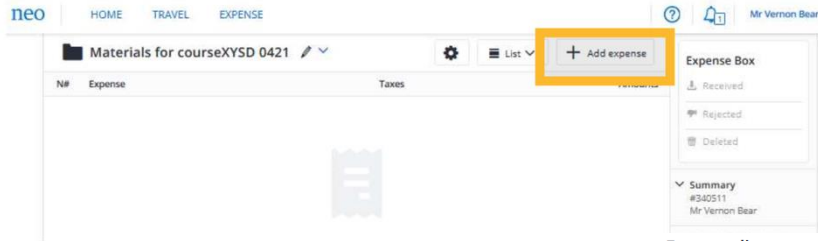
- **Name Non-travel:** Goods/Services
Travel: Destination
- **Reason for expense:** Describe the purchased materials or services in detail
- **Project code:** Type in the project number or search with the project name
- **Report Type:** Select Expense report for materials and Travel Expense report for travel related expenses
- **I have my Superiors Permission:** Select “Yes”, you always need your course responsible person’s prior approval for purchases
- **Click Confirm after you have filled in the information**

The screenshot shows a web form titled "Create expense report" with the following fields and values:

- Name:** Materials for cours:XYSD 0421 (marked as a required field)
- Reason for expense:** Materials and supplies for the course XYSD
- Distribution:**
 - Project Code:** 60444101 UNITE! ARTS LES
 - Cost Center:** A80001 Learning services ARTS
 - Project Type:** EU: Other EU funding
 - Department:** A800 School services, ARTS
 - School:** School of ARTS
- Report Type:** Expense report / Kululasku
- Object Code:** (empty)
- I have my Superiors Permission:** Yes
- Assignment Travel:** No
- Leisure Travel part of Trip:** No

At the bottom, there are two buttons: "Charge more accounts" and "Reset". A blue "Confirm" button is highlighted with an orange border.

Step 3 Add your expense lines



Expense line

Expense line

Other material and supplies Change type

Required

Location

Date :

Amount

Vendor

No receipt

You can drag and drop your receipt here

Step 4 Additional attachments

- Travel: Name lists that include travelers + destination / name of the company visited
- Refreshment expense: Name and purpose of the event, list of participants and their organizations

Click the 'Add expense' button to add your expenses to this report



To create a new expense, you can also drag and drop your receipt here or

Upload receipt

Tip: you can also drop your receipt in the list view when there are expenses

Step 5 Submit your expense report

neO HOME TRAVEL EXPENSE ? 🔔 Mr Vernon Bear

Materials for courseXYSD 0421 ✎ ⌵ Actions ⚙️ List ⌵ + Add expense

<input type="checkbox"/>	N#	Expense	Taxes	Amounts
<input type="checkbox"/>	1	Student - Material 60444101 UNITEI ARTS LES - A80001 Learning services ARTS - Tax benefit EU: Other EU funding - A800 School services, ARTS - School of ARTS - Expense report / Kululasku - N/A - Yes - No - No 📅 April 25, 2021 📍 Finland 🏠 Aalto 📄 No receipt.	VAT	0.97 EUR - Authorized 5.00 EUR Reported 5.00 EUR
<input type="checkbox"/>	2	Attachment Required 60444101 UNITEI ARTS LES - A80001 Learning services ARTS - Tax benefit EU: Other EU funding - A800 School services, ARTS - School of ARTS - Expense report / Kululasku - N/A - Yes - No - No 📅 April 25, 2021 📍 Finland 📄 Image receipt.	VAT	0.00 EUR - Authorized 0.00 EUR Reported 0.00 EUR

Expense Box

- Received
- Rejected
- Deleted

Summary
#340511
Mr Vernon Bear

Approval and History
Draft

Anomalies

Compliance issues

Reported amount
5.00 EUR

Reimbursable amount
5.00 EUR

[View PDF](#)

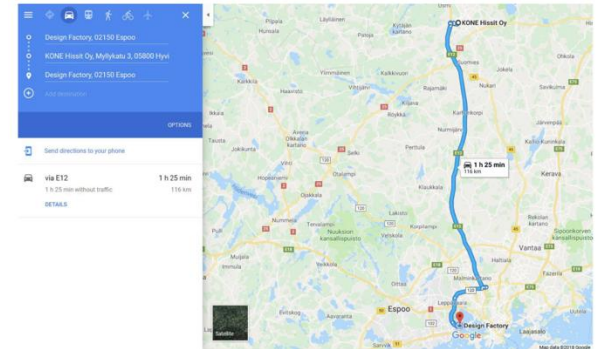
Submit

Attachments if driving

- **Example:** You had to visit KONE factory in Hyvinkää with your teammates, as part of your PDP project, and driving your own car is the best option due to lack of convenient public transportation. The itinerary is: **Design Factory – KONE – Design Factory.**
- **Step 1:** Agree on the visit with the teaching staff
- **Step 2:** Take a photo of your cars odometer (before and after) and Google map



2. Take a screenshot of the itinerary (DF – KONE – DF) from google maps



Important

- Submit your monthly cost claims in NEO by 15th of next month at the latest
- Update the costs in the budget Excel sheet and submit it via Mycourses by 15th each month
- *The ATTRACT teams: After been scanned and submitted in NEO, put the A4 paper receipts in the PDP mail box*

**In case of any inquiries don't hesitate
to contact us**

**Enjoy the experience,
learn a lot and have fun!**